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The voice for water consumers  
Llais defnyddwyr dŵr

# Water efficiency labelling

Report prepared by Yonder  
21 April 2026



Department  
for Environment  
Food & Rural Affairs

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# Background, objectives, sample and methodology



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# Background and objectives



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In 2026, the Department for Environment, Food and Rural Affairs (Defra) will be rolling out new water efficiency eco-labels for relevant water-using products, from white goods through to plumbing and bathroom fittings (full list in Appendix 1). Labels will aim to help consumers make water efficient purchases for water resource and demand management. They could also help consumers buy products more likely to be efficient overall, helping them save money on their bills, especially at a time when rising costs have brought greater focus to water use. The rollout follows a public consultation in which the labels received widespread support.

This project, co-commissioned by Defra and CCW, aimed to understand consumer expectations of the label, their potential to encourage water efficient decision-making, and the most effective channels and messages for communicating the label launch. The findings will be used to better inform surrounding communications that will be published alongside the launch.

*To note: qualitative fieldwork was carried out from 2<sup>nd</sup>-13<sup>th</sup> December 2024 before Ofwat announced average water bills were set to rise from 2025, while the quantitative survey was conducted afterwards, from 17<sup>th</sup>-28<sup>th</sup> February 2025. While this survey's topic is not directly correlated, there is the possibility that general views on water and affordability will have differed due to the announcement. Whilst the water labels will be used across the whole of the UK, this research covers respondents in England and Wales only.*

# Sample and methodology



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A two-phase, mixed methodology approach was used, beginning with qualitative research; which was used to gain a foundational understanding of consumer engagement with the water-using product market and water efficiency, and followed by quantitative research to validate and build upon these findings.



## **Qualitative phase**

*6 x 1-hour online focus groups*

*30 participants in total – 8 in Wales, 22 in England*

*2 groups with those that have recently bought a relevant product (one large, one small)*

*2 groups with those considering buying (one large, one small)*

*2 control groups with those not looking to buy*



## **Quantitative phase**

*20-minute online survey*

*2,440 responses in England and Wales*

*Buyers n=957, potential buyers n=649, hypothetical buyers n=834*

*Boosts to min. 500 sample in Wales*

*Weighting applied to be nationally representative in England and Wales*

# Executive summary



# Executive summary (1)



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## Consumer expectations of the label

- Consumers expect water efficiency labels to give them a clear, easy to understand picture of the efficiency of the product. They are familiar with the rating scale approach, but would like more information on:
  - how ratings are derived – i.e., what goes into the formula behind a product’s rating,
  - how ratings relate to each other – i.e., how much better is a B than a C, and vice versa,
  - and how ratings relate to real world impact – i.e., how does this translate into actual water usage, and, in turn, how this translates to cost, which is a key driving factor in water efficient purchasing decisions throughout.

## Effective communication channels

- Most commonly, consumers that want to see more information would like it on the label itself (61%), which bears consideration for the next design update. A large proportion would like to get more information in a product manual (46%) or via an accompanying website, reachable by link (35%) or QR code (26%).
- Working with manufacturers to communicate about water efficiency via these routes could be effective, with most (83%) thinking it is important that they communicate how much water their product uses.
- Most consumers either buy online or in-store, with websites (28%) a highly-ranked source, and final decisions driven by reviews (30%), low prices (30%), and reputation (28%). Working with reputable, established brands to weave water efficiency into their messaging would be effective.

# Executive summary (2)



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## Encouraging water efficient decision-making

- Respondents' views on water efficient products are already positive, with a belief that they cost less (43%) or the same (29%) as non-efficient alternatives, and also that they work better (37%) or make no difference to good performance (47%).
- Additionally, where asked to choose between identical products with and without a water label, the overwhelming majority (83%) opt for the product with a label; supporting the finding that a water efficiency label would make seven-in-ten (69%) would think about actions they can take to reduce water use. Notably, the amount of water smaller appliances use is often overlooked by respondents, signifying the importance of including a water label on appliances such as taps.
- When cost is added to the mix, respondents are split, with 43% choosing a product with a better rating at a higher cost, and 40% choosing the cheaper, lower-rated product. Emphasising the long-term cost savings that water efficient products can bring via cutting bills will be essential to encouraging water efficient decision-making.
- A clear link between positive environmental impact, which is already understood by 76%, and positive financial impact could help to further encourage water efficient decision-making.
- Customers are more likely to factor in water efficiency when they have more time to make decisions. As the public becomes more aware of water efficiency labels, there is opportunity they influence purchasing decisions over a longer period.

# Billing and the cost of water



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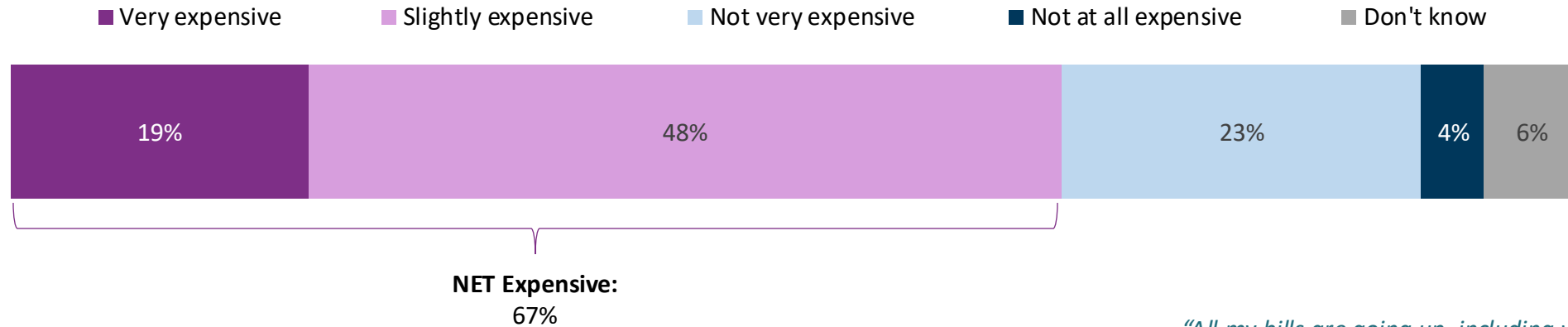
# At the time of fieldwork, water bills were already felt to be expensive



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## View on water bill

All with bill paying responsibility



NET Expensive:



London:  
74% ↑



Southeast:  
73% ↑



Those who take  
measures to  
save water:  
69% ↑

*"All my bills are going up, including water"*  
Female, 25-30, Control group

*"Water costs have definitely gone up - I've been in my house for years, and it's gotten more expensive over time"*  
Male, 40-49 years, Prospective large appliance purchaser

↑ Statistically higher than the total

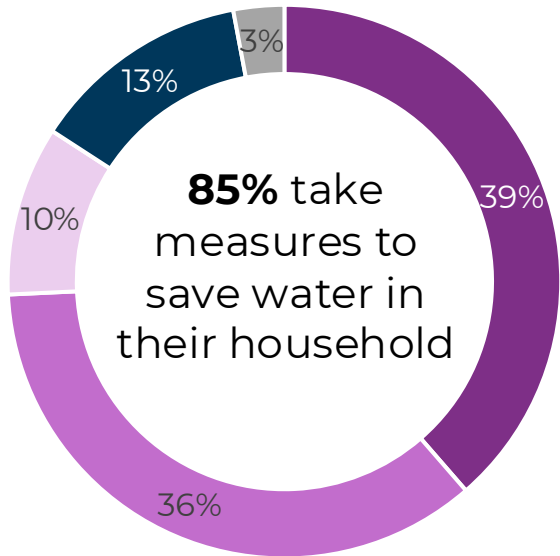
# Most say they take measures to save water, across a range of products used



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## Measures to save water

All respondents



- Yes, I do frequently
- Yes, I do sometimes
- Yes, I do but not too often
- No, we don't take any measures at all
- Don't know



**55+:**  
92%↑



**Potential buyers:**  
88%↑



**More likely to think water efficient products:**



**Women:**  
87%↑



**Home owners**  
87%↑

**Work better**  
88%↑

**Are better for environment**  
88%↑

*"Don't run the tap, don't fill the kettle with more than we need, collect the leftover water from the shower head after showering for watering plants, limit the length of showers."*

Male, 33, London

*"Flush the loo after 2 people have been. Wash up in batches. Shower 3 times a week and no baths."*

Male, 55, Southeast

*"Short showers, always run a full dishwasher and washing machine, turn tap off when brushing teeth. To save money and not waste water."*

Female, 52, Northwest

↑ Statistically higher than the total

Base: Q\_MEASURES. Do you take any measures to save water in your household? All respondents (2440)

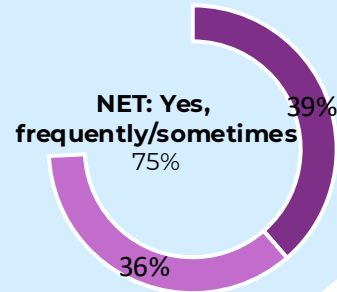
# While consumers claim to save water, their action can be limited



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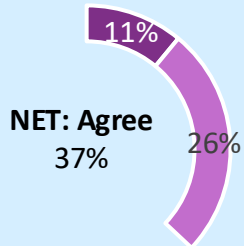
- Qualitative insights reveal a gap between how consumers perceive their water-saving efforts and their actual level of action
- Focus group findings suggest that although **consumers are inclined towards water saving behaviours, they do not always carry them out, especially unless they see a clear financial benefit**, something that can be felt more strongly amongst metered individuals. Additionally, social pressure may influence individuals to claim that they take measures to save water, even if their actions are limited. This disconnect is known as the **intention-action gap**.

**Intention** – reportedly takes measures to reduce water use



*"I feel like a lot of us are not as conscious about water consumption as we should be because we don't see it and we don't know how much its costing us because a lot of people aren't on meters so we are a bit relaxed about it"*  
Female, 25-30 years, qualitative focus group

**Action** – would only reduce water use if it saved money



*"I feel really bad saying this, but I'm not mindful of my water usage. I don't turn off the tap while brushing my teeth, and saving water isn't part of my routine- unless I hear something like a leaking tap or shower head"*  
Female, 40-49 years, qualitative focus group

# Generally, respondents think larger appliances use more water



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## Consumers tend to associate large appliances / products with high volumes of water usage

- This is due to their **longer running times**, for example, a dishwasher or a washing machine cycle can run for hours
- This perception likely also **stems from energy consumption patterns**, since larger appliances are typically recognised to use more energy, consumers can assume they use more water too

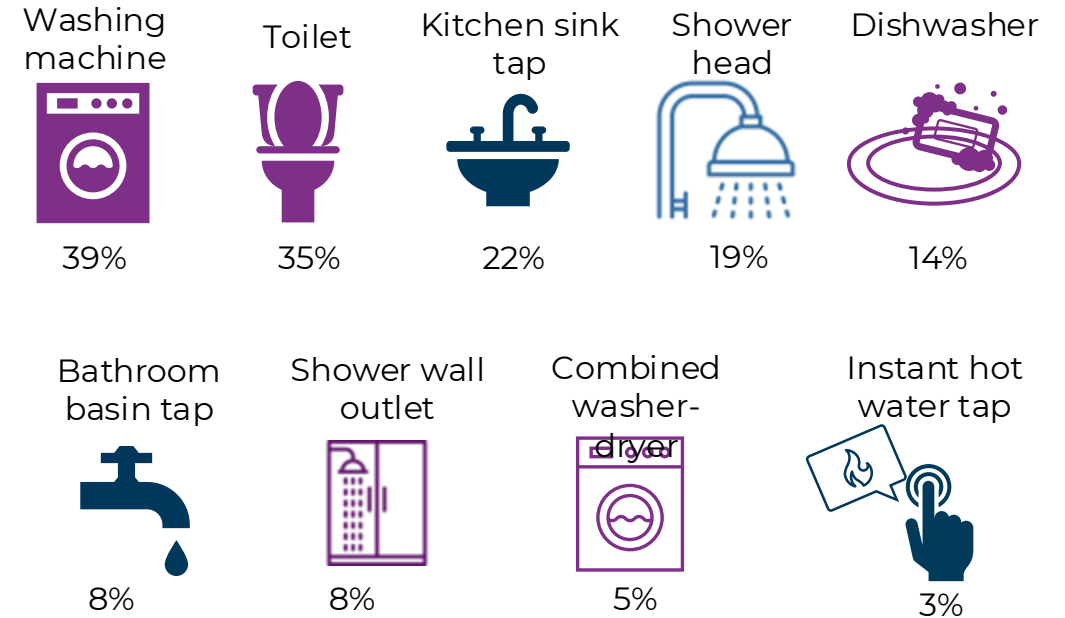


## The amount of water smaller appliances use is often overlooked

- Consumers can struggle to link smaller appliances to significant water usage due to their **less visible consumption**
- This is despite **frequent usage** resulting in large volumes of water being used
- Additionally, smaller appliances are perceived as **less prone to leaks** and water waste compared to larger appliances

## Which product do you think uses most water?

All respondents



Large appliances / products are indicated using purple  
Small appliances / products are indicated using blue

# Purchasing journey



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The logo for CCW (Consumer Council for Water) is written in a light blue, cursive, handwritten-style font.

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## Motivations



# Necessity is the key driver for those who have bought water-using products recently



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Mostly, products were bought out of necessity (replacing an old, broken model), though larger, aesthetically-focused products (shower wall outlets, toilets), were more often bought as part of a wider renovation.

## Motivations for buying

All buyers

|                                       | The old one had broken | It was part of a wider renovation / new design of the room | It was more energy efficient | I wanted to replace the old one, even though it wasn't broken | It was a newer model with better technology | It was more water efficient |
|---------------------------------------|------------------------|--|------------------------------|---|---|-----------------------------|
| Washing machine                       | 59%                    | 4%   | 19%                          | 8%  | 17%   | 14%                         |
| Combined washer-dryer                 | 30%                    | 14%  | 22%                          | 10%   | 17%   | 10%                         |
| Dishwasher                            | 42%                    | 14%  | 20%                          | 8%  | 17%   | 15%                         |
| Shower wall outlet                    | 20%                    | 36%  | 15%                          | 15%   | 11%   | 12%                         |
| Toilet                                | 30%                    | 43%  | 8%                           | 17%   | 5%  | 15%                         |
| Shower head                           | 44%                    | 12%  | 8%                           | 21%   | 7%  | 16%                         |
| Instant hot water tap                 | 10%                    | 21%  | 24%                          | 6%  | 12%   | 17%                         |
| Washbasin tap                         | 35%                    | 28%  | 5%                           | 19%   | 7%  | 12%                         |
| Kitchen (incl. utility room) sink tap | 46%                    | 17%  | 8%                           | 16%   | 7%  | 6%                          |

Water efficiency was not a main reason for deciding to buy products, though was slightly more common for those buying hot water taps, shower heads, toilets and dishwashers.

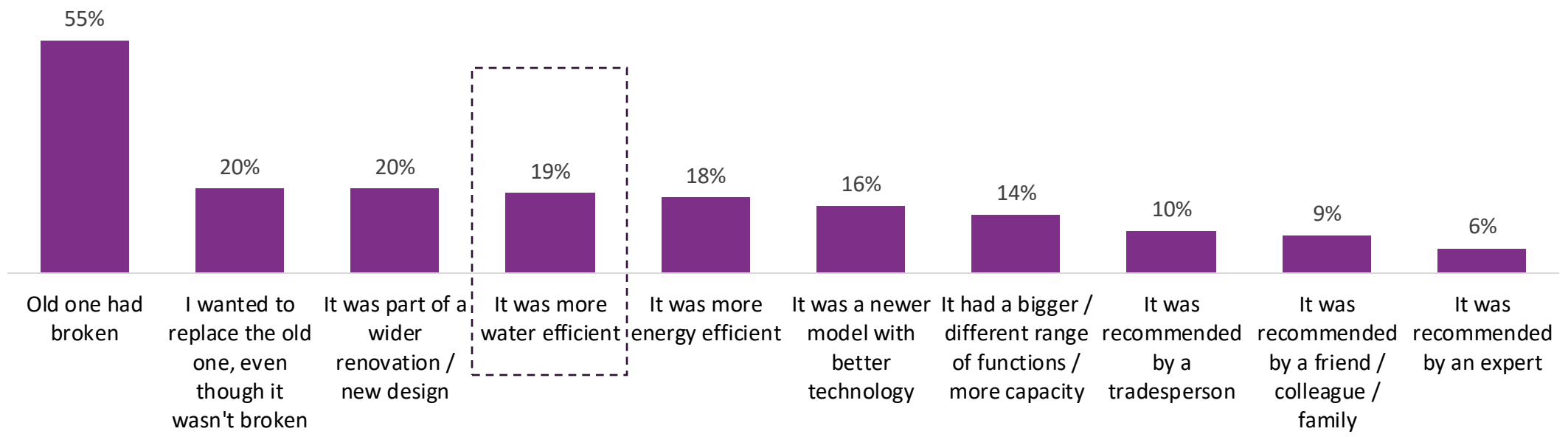
# When looking across all products, water efficiency was a motivation to buy for one-in-five



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## Motivations for buying, NET: Any mention across products

All buyers



# For potential buyers, water efficiency is slightly more important, as they encompass more factors in their decision



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*For potential buyers, renovation, and replacing non-broken products, were key motivations, perhaps hinting towards a more 'casual' group that are looking to upgrade, rather than those changing out of necessity.*

## Motivations for buying

All potential buyers

|                                       | I want to replace the old one, even though it isn't broken | I am renovating / redesigning the room | I want a more energy efficient model | I want a better-looking model | I want a newer model with better technology | I want a more water efficient model |
|---------------------------------------|--|--|--------------------------------------|-------------------------------|---|-------------------------------------|
| Washing machine                       | 41%  | 6%                                     | 30%                                  | 11%                           | 15%   | 21%                                 |
| Combined washer-dryer                 | 22%  | 17%                                    | 21%                                  | 12%                           | 23%   | 22%                                 |
| Dishwasher                            | 22%  | 14%                                    | 19%                                  | 7%                            | 11%   | 14%                                 |
| Shower wall outlet                    | 28%  | 35%                                    | 13%                                  | 17%                           | 11%   | 13%                                 |
| Toilet                                | 32%  | 43%                                    | 8%                                   | 22%                           | 10%   | 14%                                 |
| Shower head                           | 38%  | 14%                                    | 10%                                  | 13%                           | 16%   | 22%                                 |
| Instant hot water tap                 | 8%   | 27%                                    | 17%                                  | 5%                            | 14%   | 14%                                 |
| Washbasin tap                         | 30%  | 27%                                    | 4%                                   | 13%                           | 5%  | 11%                                 |
| Kitchen (incl. utility room) sink tap | 29%  | 27%                                    | 4%                                   | 15%                           | 7%  | 10%                                 |

*For this group, though still not a primary concern, water efficiency has more of a role to play, indicating that it is at least part of the picture for future buyers.*

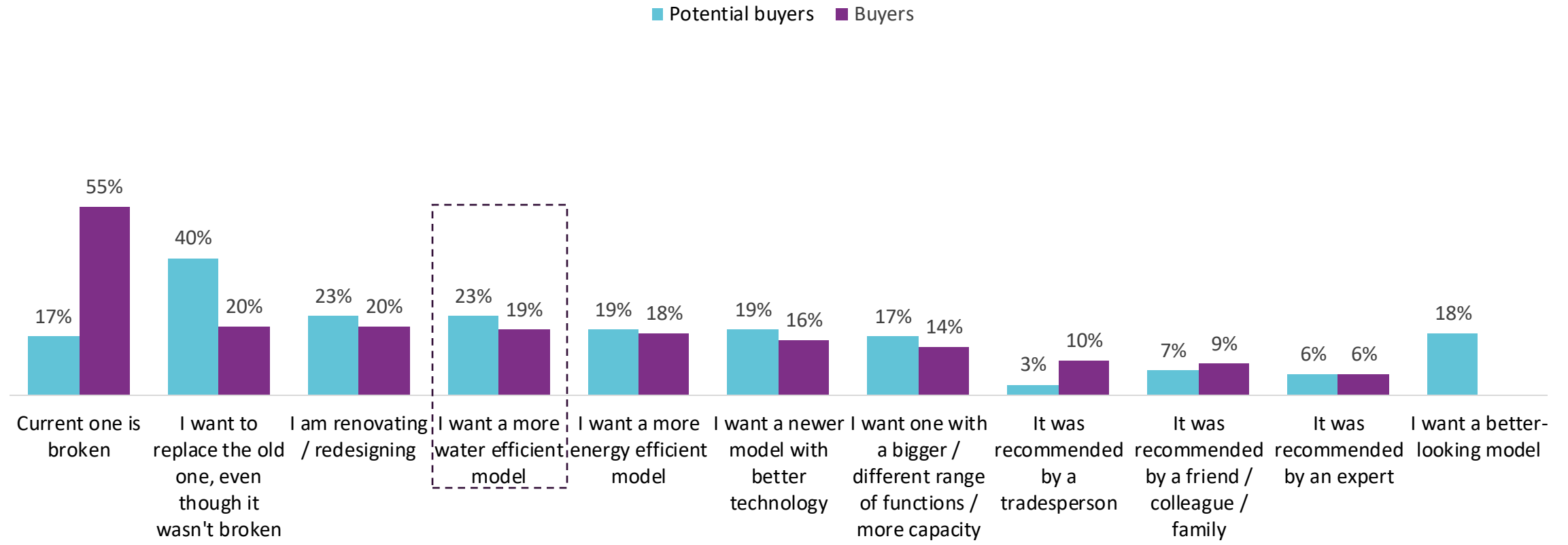
# Potential buyers are more inclined to replace out of desire rather than necessity, with water efficiency considered slightly more by this group



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## Motivations for buying, NET: Any mention across products

All potential buyers



A large, stylized, light blue 'CCW' logo is positioned in the background on the right side of the page. It is rendered in a thick, rounded, cursive font with a slight 3D effect, appearing to float above the purple background.

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## Information and sources

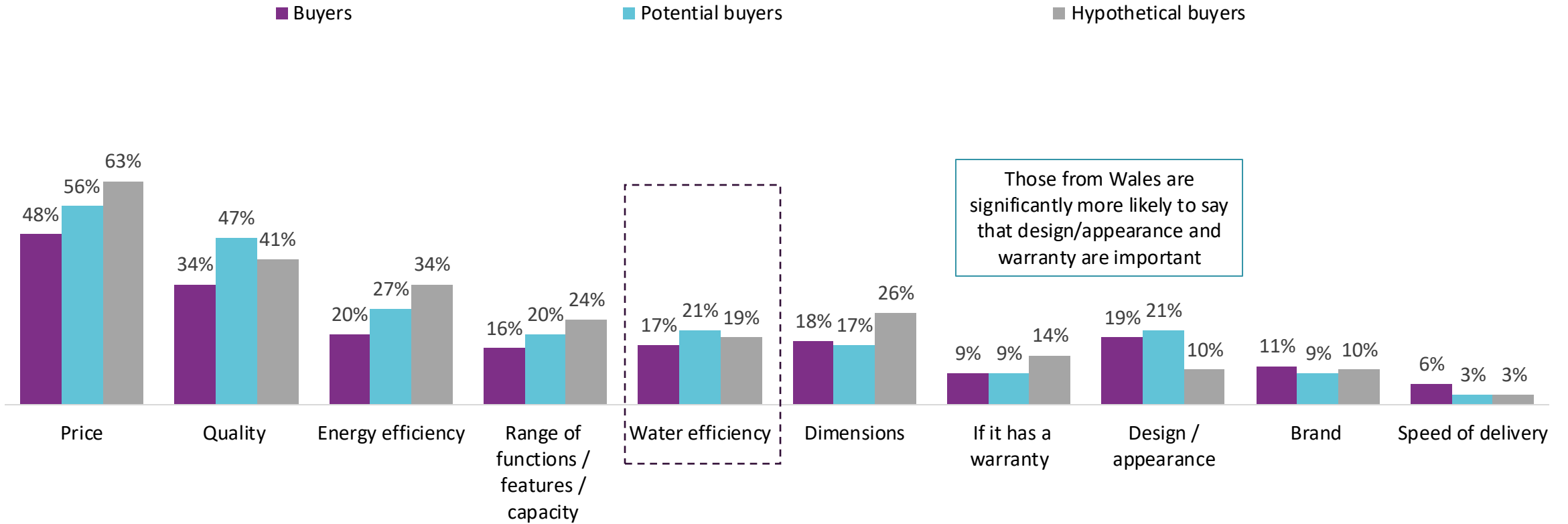
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# Information needs become more specific across the purchase journey



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## Top 3 pieces of information ranked by buyers, potential buyers, and those facing hypothetical search



\*Non-landlords include homeowners who let a property over 12 months ago, never let out a property or renters

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Choice



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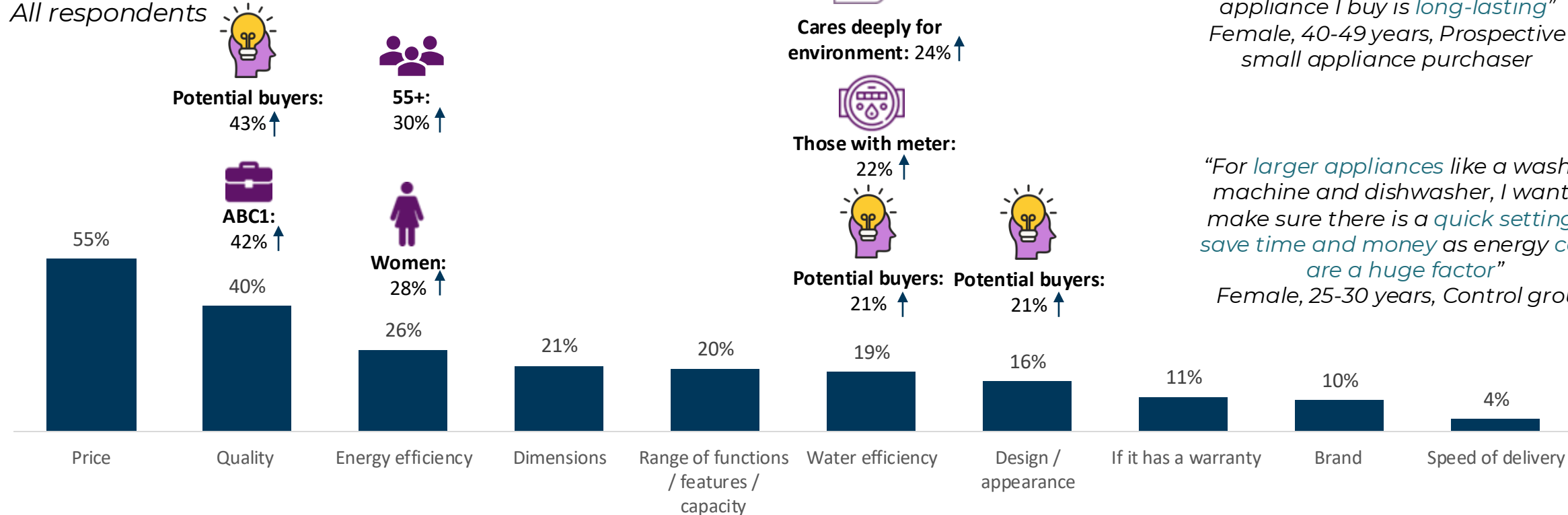
# Price and quality are the top considerations for purchase decisions, but water efficiency still plays a role



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## Which factors are most important to you in deciding what to buy? Top 3

All respondents



*"I want to make sure any appliance I buy is long-lasting"*  
Female, 40-49 years, Prospective small appliance purchaser

*"For larger appliances like a washing machine and dishwasher, I want to make sure there is a quick setting to save time and money as energy costs are a huge factor"*  
Female, 25-30 years, Control group

↑ Statistically higher than the total

Base: Q.INFO. Which factors are most important to you in deciding what to buy? All respondents (2440)

# Among those who thought water efficiency to be important, cost and the environment were key



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## Why water efficiency was important

All who rank water efficiency as important

### Cost and financial considerations

"I live in an area where water is **expensive.**"  
*Male, 81, Southwest*

"**To keep water bills down and affordable.**"  
*Male, 75, Yorkshire & Humber*

"Want to be able to save on water to **keep my bills down.**"  
*Female, 58, Yorkshire & Humber*

"**Price is much more important to me** as I cannot afford a top of the range water saving appliance."  
*Female, 28, Wales*

### Environmental awareness

"Because I care about not overusing and **damaging the environment.**"  
*Male, 33, London*

"To be more environmentally conscious."  
*Female, 24, London*

"I am trying to buy things that are **better for the planet.**"  
*Male, 63, Wales*

"Saving water is an important part of the need for **care in climate change.**"  
*Male, 78, Southeast*

**As demonstrated in the qualitative phase, consumer engagement** with water usage and bills will **likely continue to rise if water bills become more expensive**, prompting consumers to pay closer attention to their water consumption and look for ways to reduce costs, much like they already do with energy.

# Those that did not think water efficiency to be important focused more on affordability and performance



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## Why water efficiency was not important

All who rank water efficiency as not important

Qualitatively, consumer awareness and engagement with water is limited compared to other utilities, such as energy. They consider water to be more affordable, thus lowering its importance, despite recent price increases.

### Affordability of the appliance takes precedence

"Price was **more important.**"  
*Male, 31, Southwest*

"**Cost is most important at the moment,** if it does the job cheaply then it will do."  
*Female, 22, Northwest*

"I have a **very limited budget** for things like white goods."  
*Female, 68, West Midlands*

"Other factors like **price and performance tend to take precedence** for me."  
*Female, 40, East of England*

### Water meter influence

"We are not on a water meter **so less concerned about water use.**"  
*Male, 48, Southeast*

"It isn't my main priority **as I don't have a water meter.**"  
*Female, 47, Northwest*

"At the moment I don't have a water meter **so water efficiency is not important.**"  
*Male, 30, London*

"**We are on an unmetered water tariff.**"  
*Female, 40, Wales*

### Performance of the appliance takes precedence

"My priority is for it **to be functional and look nice** in my kitchen."  
*Male, 45, Northwest*

"**I want my laundry to be more clean.**"  
*Female, 37, London*

"I don't worry about efficiency **as long as the appliance performs well.**"  
*Male, 74, Wales*

"**The product performance is more important** than water efficiency."  
*Male, 76, East Midlands*

Base: Q\_EFF\_VIEW\_2. Why water efficiency was not important. All who rank water efficiency as not important (984)

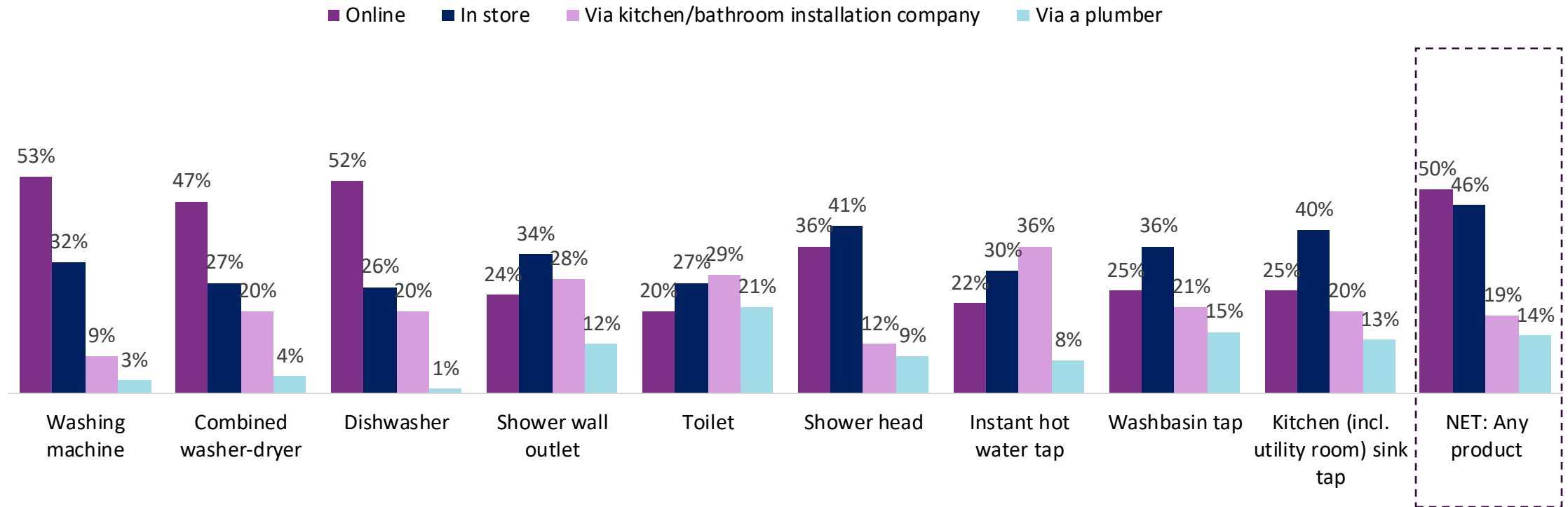
# In-store and online were the most common places to buy; online being more likely for larger products, and in-store for smaller



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## Where products are bought

All buyers



\*please note that response option "elsewhere" is excluded from this chart (response was between 1-3% for all products). Hence, sum of percentages is not 100%.

# Price, customer reviews and reputation are ultimately key in retailer choice

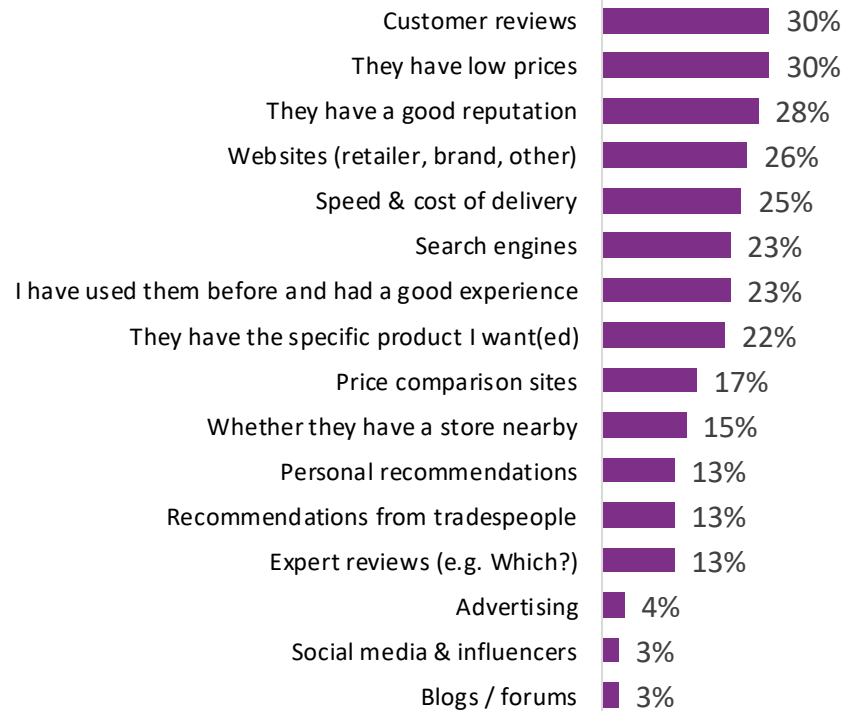


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## How buyers and potential buyers choose retailers

All buyers and potential buyers

Those from Wales are significantly more likely to choose retailers based on advertising



## Most common retailers cited

All buyers



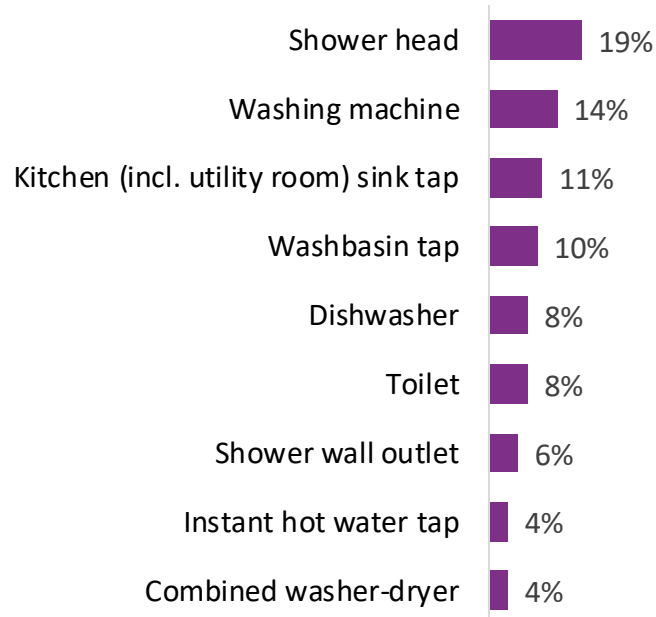
Base: Q\_RETAILER. How did you choose/ are you choosing where to buy from? All buyers/ potential buyers (1606)

# Two-thirds of buyers think their recent product buys are water efficient

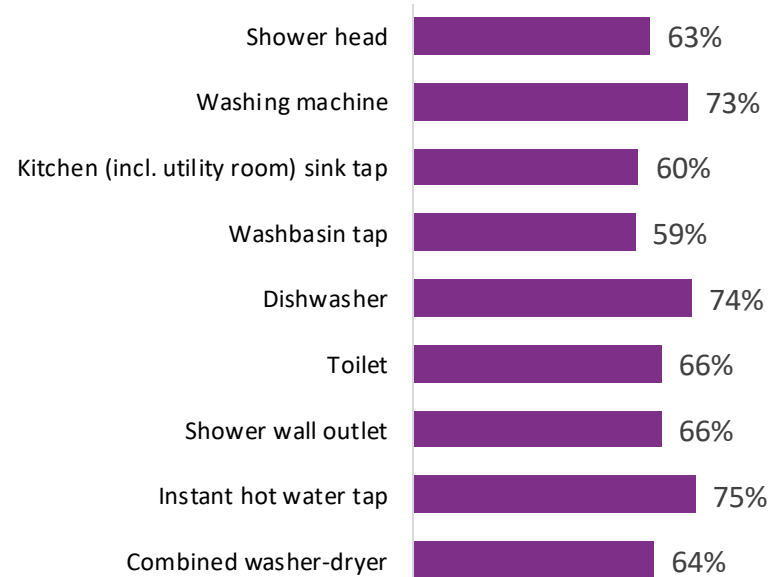


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## Products bought All respondents



## Whether products bought are water efficient All buyers



**Average:**  
66%

Base: Q\_BOUGHT. Have you bought any of the following in last 12 months? All respondents (2440), All buyers (957)

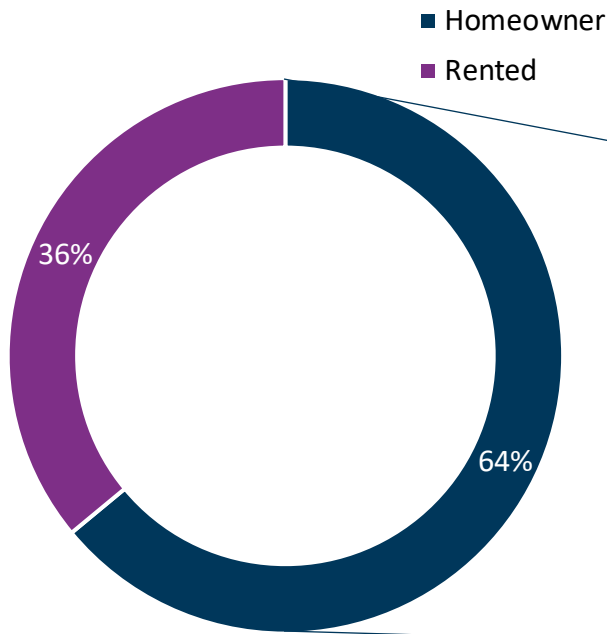
# Most renters were typically responsible for buying new products



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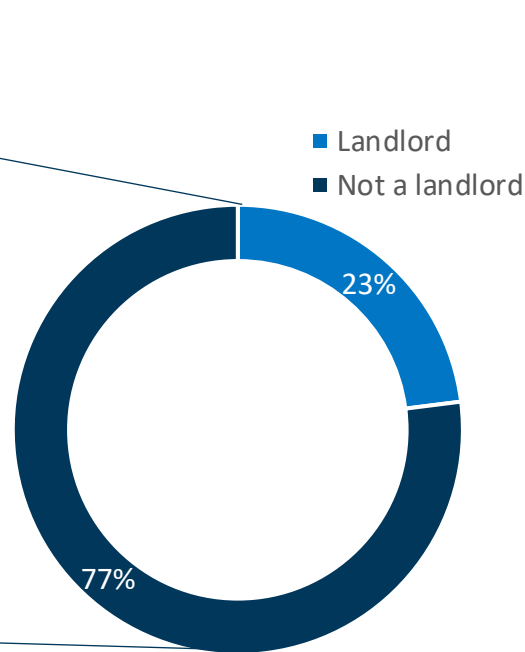
## Whether owns home or rents

All respondents



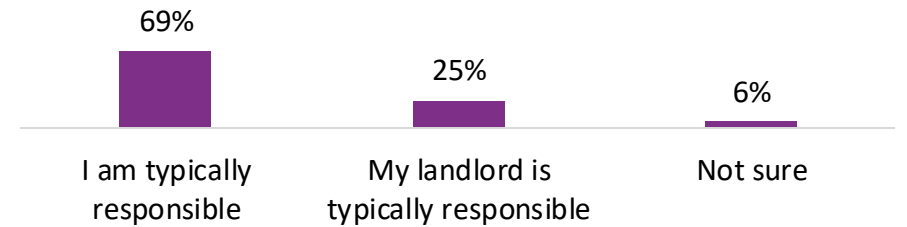
## Among homeowners, whether is/has been a landlord

All homeowners



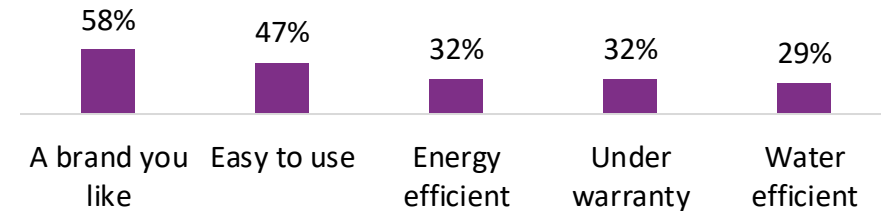
## Responsibility for buying

All renters



## Do you have any say whether the product is...

All where landlord is typically responsible



# Necessity is the key driver of engagement with water-using products; water efficiency is a part of the consideration mix, though not prime



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# Perceptions of water efficient products



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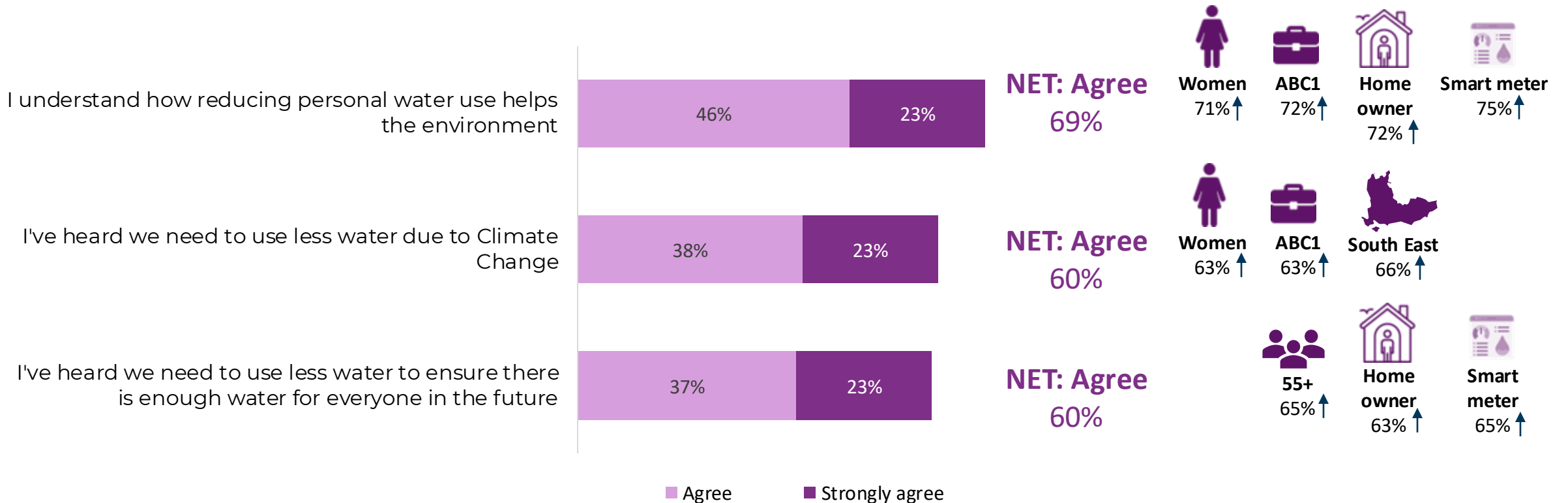
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# There is a strong understanding of the link between water use and the environment



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↑ Statistically higher than the total

Base: Q\_ATT. How far do you agree or disagree... All respondents (2440).

I understand how reducing personal water use helps the environment: Neither agree nor disagree (19%), Disagree (6%), Strongly disagree (2%);

I've heard we need to use less water due to Climate Change: Neither agree nor disagree (21%), Disagree (8%), Strongly disagree (4%);

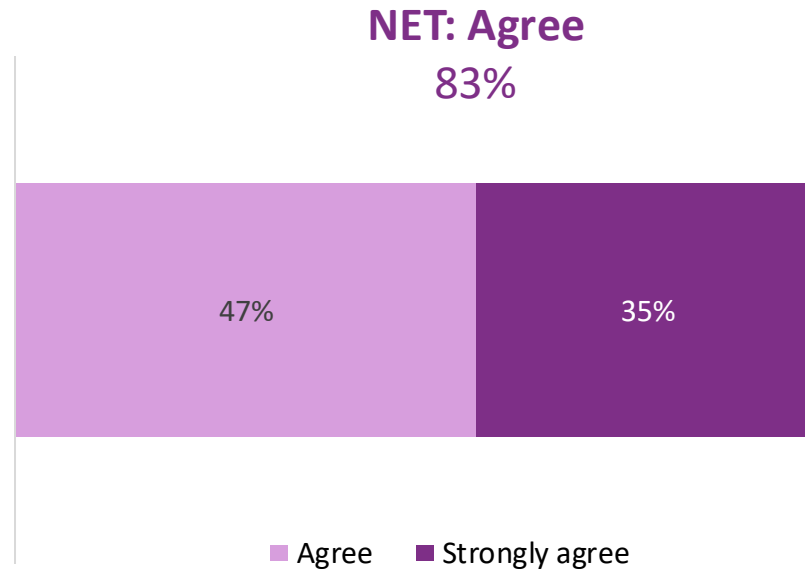
I've heard we need to use less water to ensure there is enough water for everyone in the future: Neither agree nor disagree (20%), Disagree (10%), Strongly disagree (4%).

# While most think it is important that water use is communicated

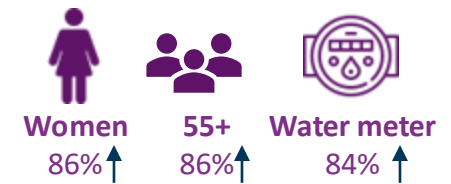


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It is important for manufacturers to communicate how much water their products use



NET: Agree



↑ Statistically higher than the total

# Generally, water efficient products are thought to cost less compared to others

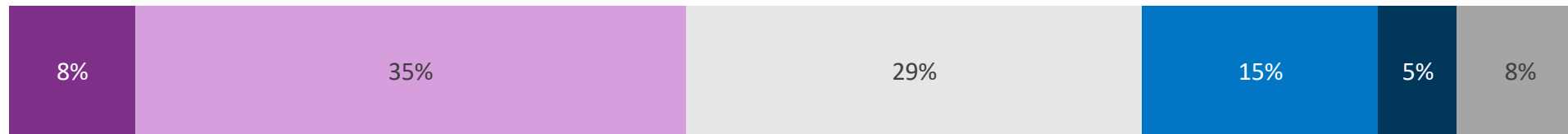


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## Perceived impact of water efficiency on product cost

All respondents

■ Cost much less   ■ Cost slightly less   ■ Cost the same   ■ Cost slightly more   ■ Cost a lot more   ■ Don't know



**NET Cost less: 43%**

**NET Cost more: 20%**



**18-34s**  
25%



**Water meter**  
22%



**Non-white:**  
24%



**Urban:**  
21%

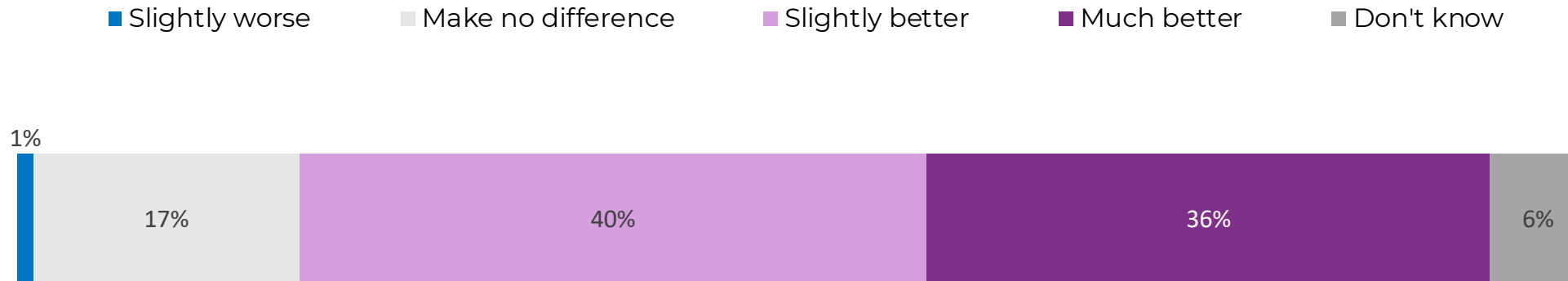
# As expected, three-quarters understand that water efficient products are better for the environment



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## Perceived impact of water efficiency on the environment

All respondents



**NET better for environment:**

76%



**ABC1**  
79%



**White:**  
77%

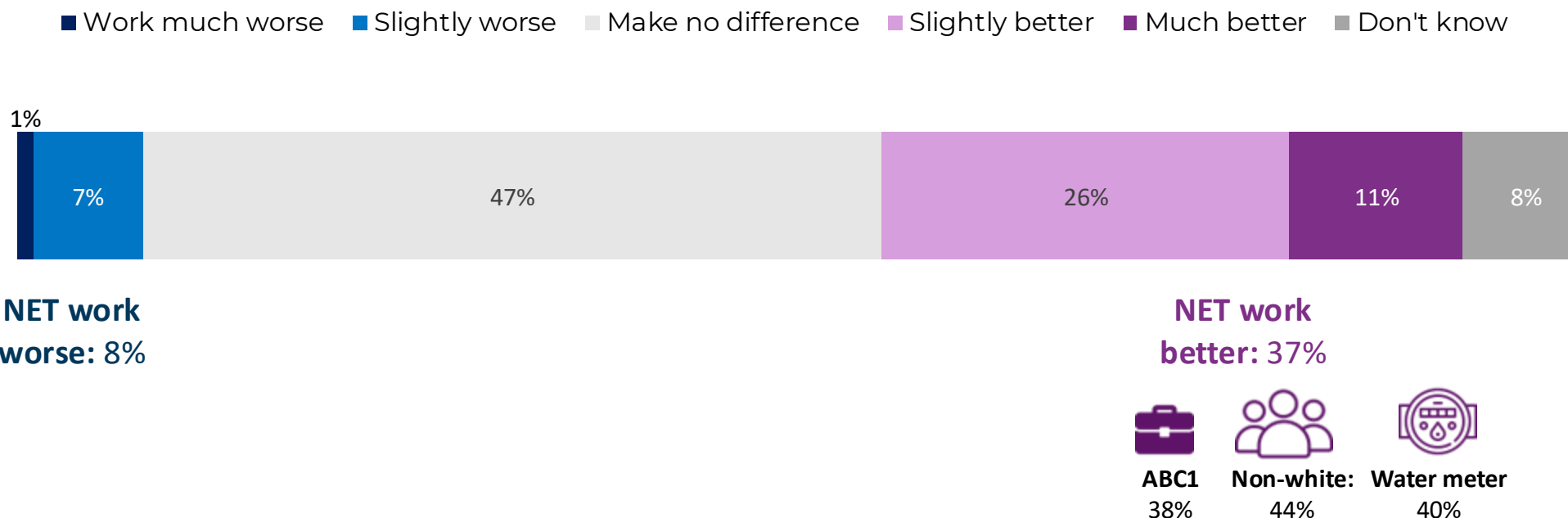
# Water efficiency is broadly thought to make either a positive difference, or no difference, to how products work



The voice for water consumers  
Llais defnyddwyr dŵr

## Perceived impact of water efficiency on how well products work

All respondents



# Impact of the label



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# Seven-in-ten reported the presence of a label would make them think about actions they could take to reduce water use

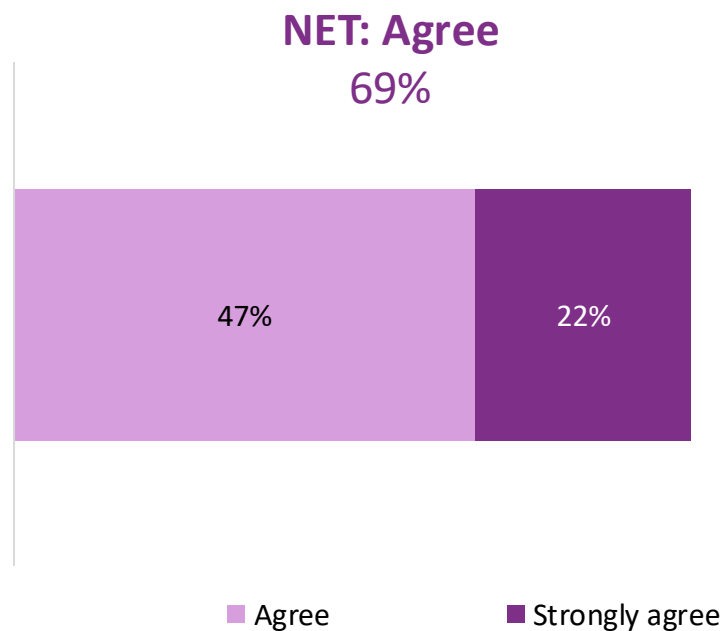


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**72%** agree that an energy efficiency label would make them think about actions use to reduce energy use

A water efficiency label would make me think about actions I can take to reduce water use



**Women**  
73%↑

**ABC1**  
72%↑

**Smart meter**  
74%↑



**More likely to think water efficient products:**

**Work better**  
83%↑

**Cost more**  
77%↑

**Are better for environment**  
77%↑

↑ Statistically higher than the total

# Up to now, very few have seen, read, or heard any news about water efficiency labels

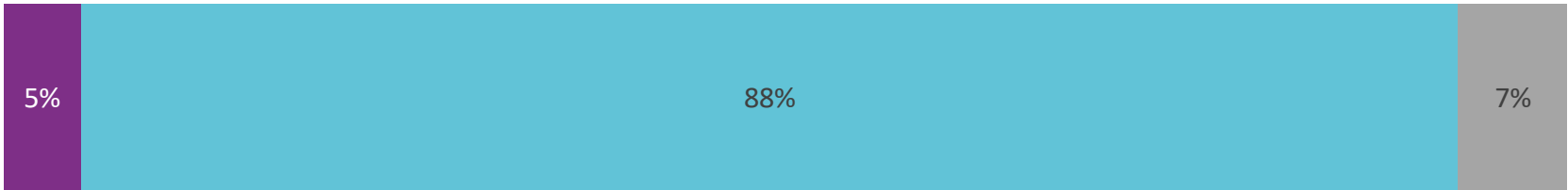


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## Whether has seen, read or heard any news about water efficiency labelling in last 6 months

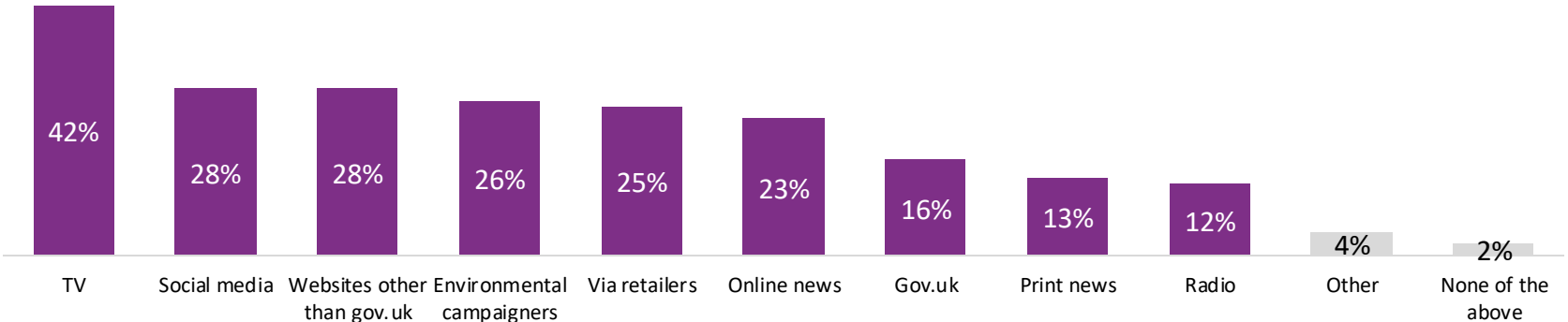
All respondents

■ Yes ■ No ■ Don't know



## Where has seen, read or heard any news about water efficiency labelling in last 6 months

All that have seen, read or heard news



Qualitatively, the label's introduction is seen by consumers as timely, if not overdue, due to growing wider concerns about global warming and water usage in the UK.

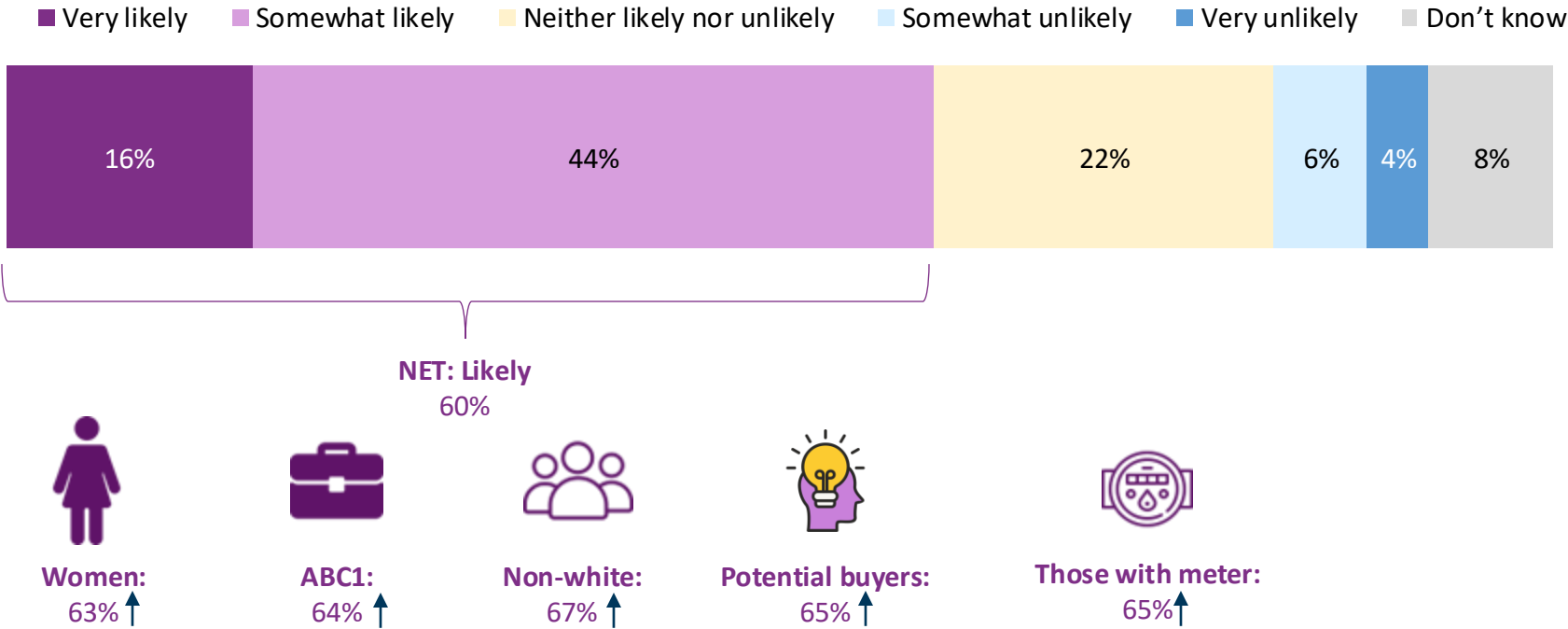
# But when prompted, most say the presence of the label *will* influence their decision on what to buy



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## Whether presence of new water efficiency label with change decision on what to buy

All respondents



↑ Statistically higher than the total

Base: Q\_CHANGE\_DECISION. Whether label will change decision. All respondents (2440)

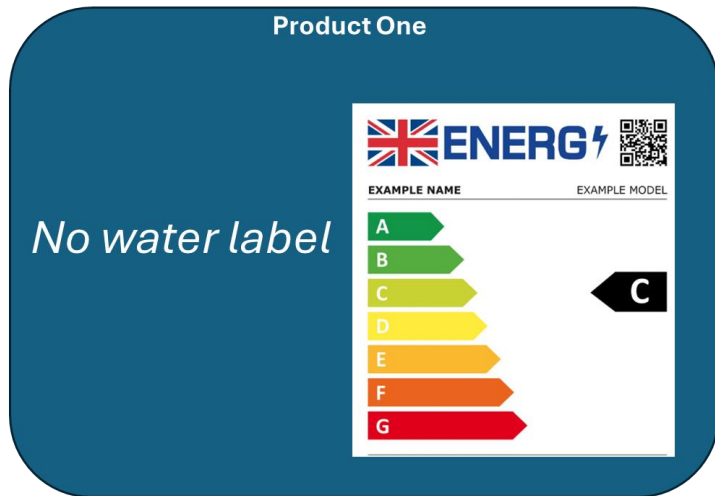
# All else being equal, respondents overwhelmingly chose the product with a water label



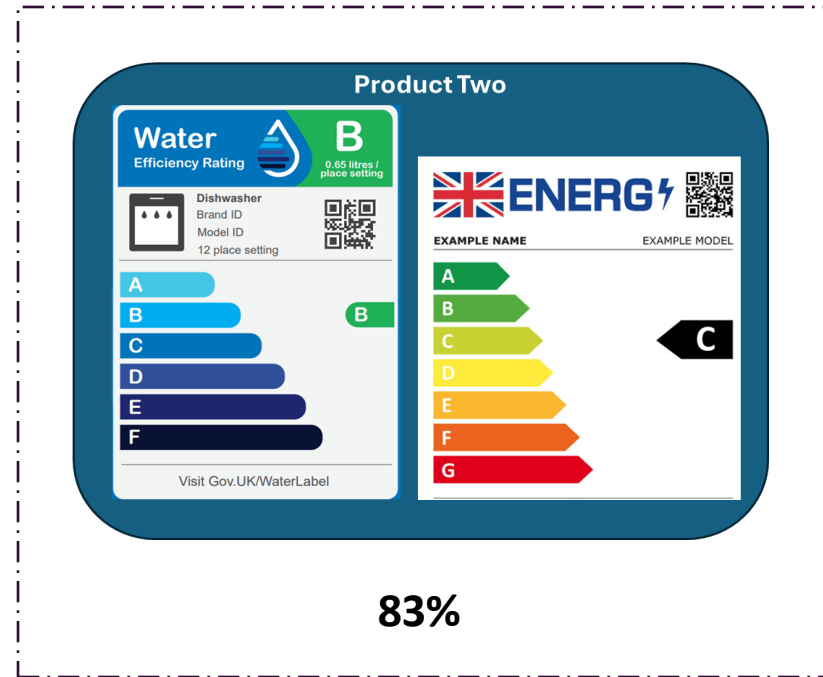
The voice for water consumers  
Llais defnyddwyr dŵr

**With all else equal, which do you think you would be more likely to buy?**

All respondents



4%



83%

Don't know

13%

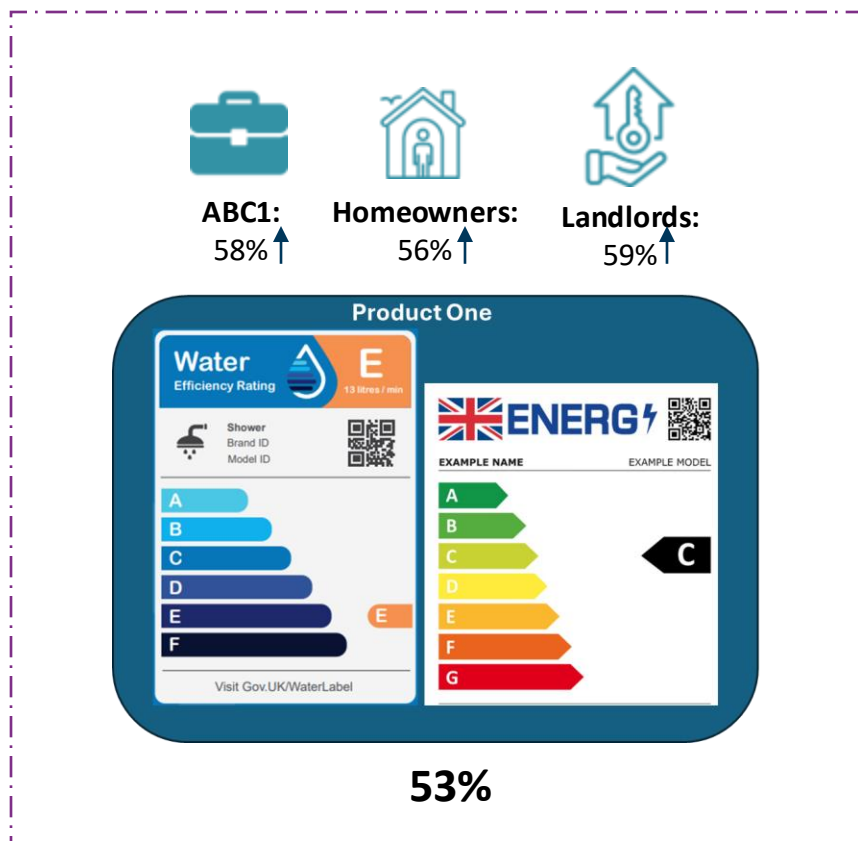
# However, where both labels were present, they tended towards the one with a better energy rating



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Llais defnyddwyr dŵr

**With all else equal, which do you think you would be more likely to buy?**

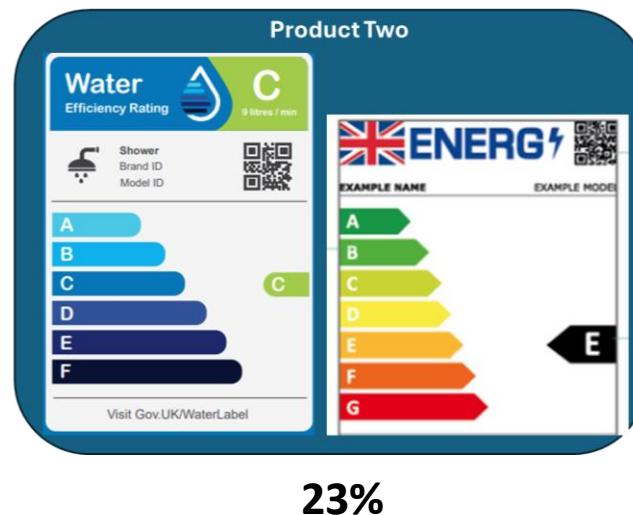
All respondents



Those that haven't bought nor looking: 28% ↑

Those that think water efficient products work better: 29% ↑

London: 28% ↑



Don't know

24%

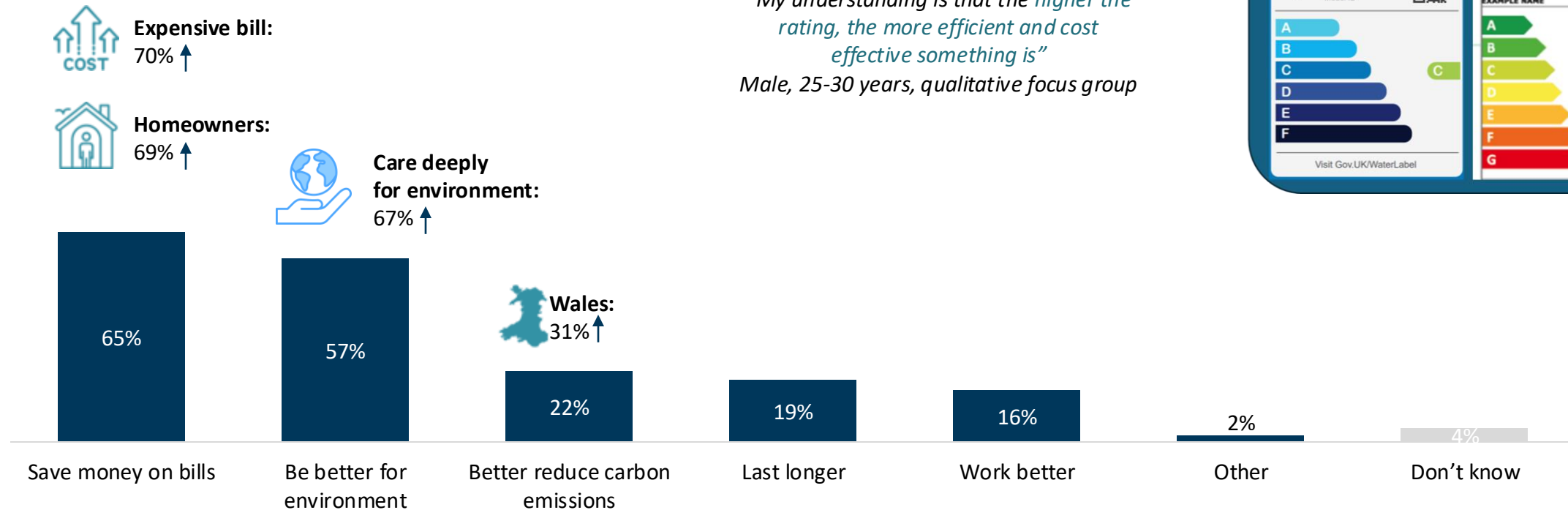
↑ Statistically higher than the total

# Savings were a key consideration for those that preferred the product with a better water rating, closely followed by environmental considerations

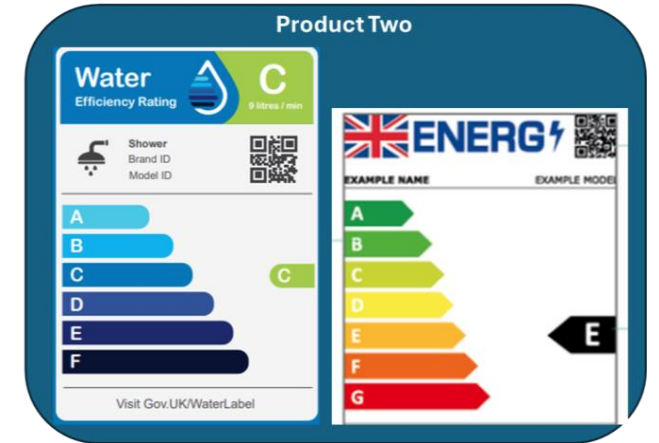


The voice for water consumers  
Llais defnyddwyr dŵr

It looks like you would choose a better water score. Is this because the product will...  
All that chose better water score product



*"My understanding is that the higher the rating, the more efficient and cost effective something is"*  
Male, 25-30 years, qualitative focus group



↑ Statistically higher than the total

Base: Q\_PRIORITIES\_1\_WATER. Is this because you think a product with this combination of ratings will...All who chose Water C, Energy E at Q\_LABEL\_COMB\_1 (546)

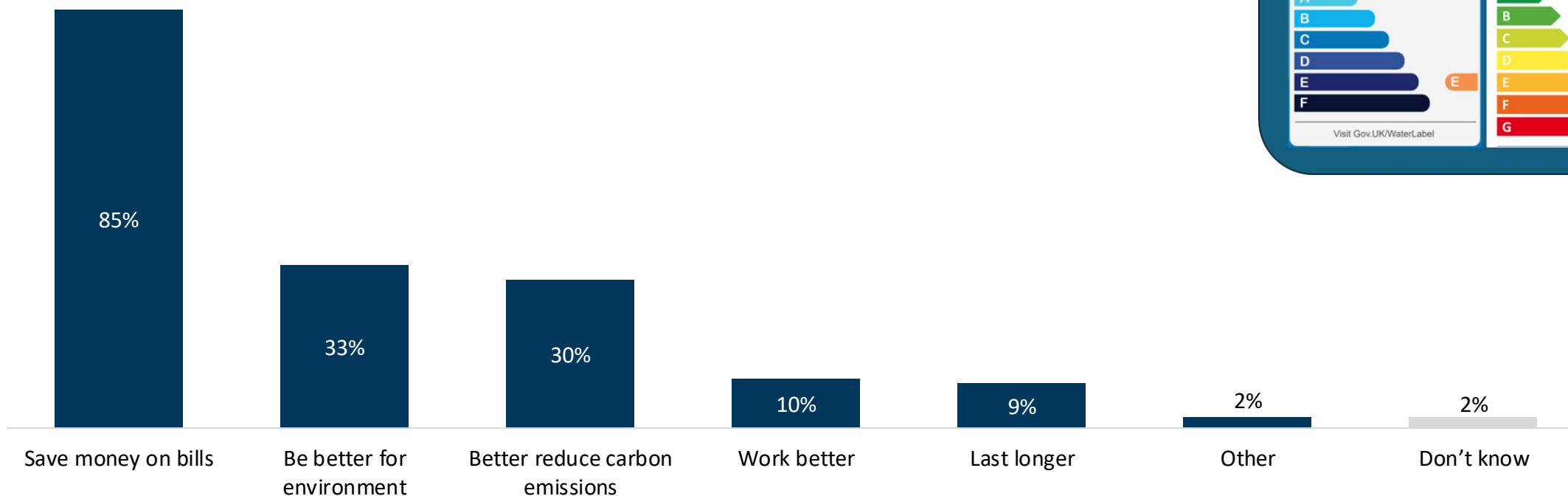
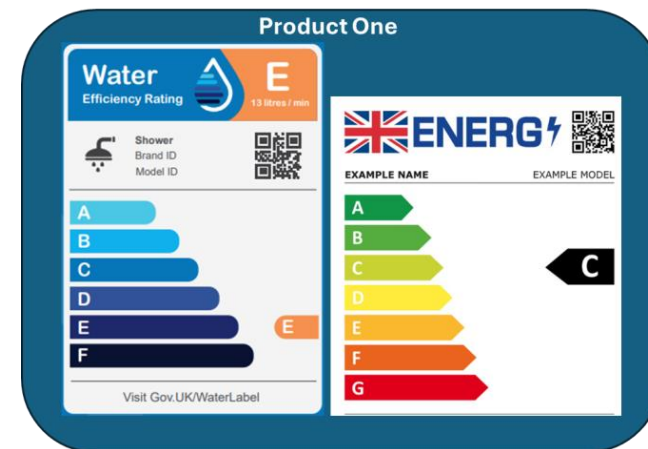
# While overall priorities were the same for those that opted for the better energy rating, strength of feeling around saving money was increased



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Llais defnyddwyr dŵr

It looks like you would choose a better energy score. Is this because the product will...

All that chose better energy score product



# There was a mixed picture when cost was added to the consideration



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**With all else equal, which do you think you would be more likely to buy?**

All respondents



Potential buyers:  
48% ↑



Smart water meter:  
47% ↑



ABC1:  
45% ↑



Those that think water efficient products work worse:  
55% ↑

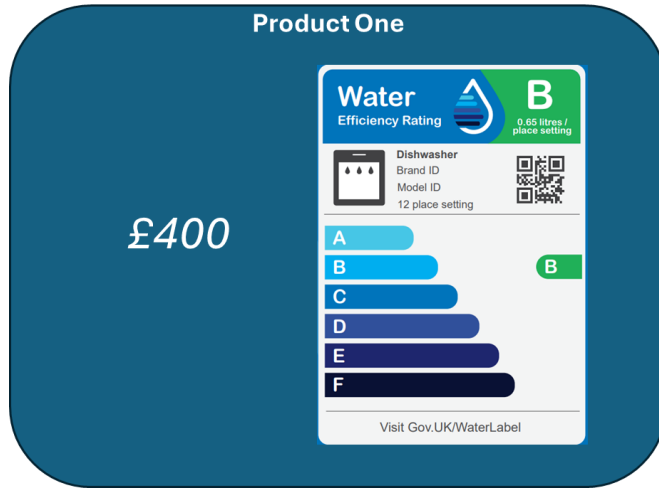


Does not save water:  
53% ↑

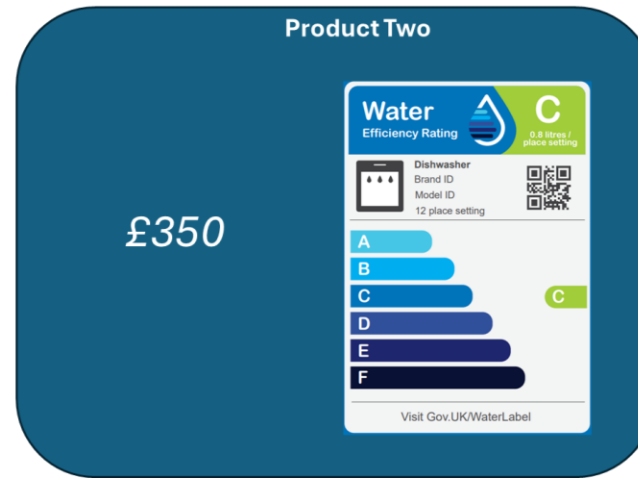


Rural:  
45% ↑

Those that haven't bought nor looking:  
20% ↑



43%



40%

Don't know

17%

↑ Statistically higher than the total

Base: Q\_LABEL\_COMB\_3. Assuming all else is the same (e.g. brand, functionality), which do you think you would be more likely to buy? All respondents (2440)

# Introducing our heatmapping exercise



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**Water**  
Efficiency Rating

**C**  
6 litres / kg

**Washing Machine**  
Brand ID  
Model ID  
6kg rated capacity

A  
B  
C  
D  
E  
F

Visit [Gov.UK/WaterLabel](http://Gov.UK/WaterLabel)

*Respondents were asked to review the water label (in this case, relating to a washing machine), and click the areas that they would like more information about.*

# The overall rating drew the most attention



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Llais defnyddwyr dŵr

The water rating for this product (shown in top right, and middle right), drew considerable attention, suggesting respondents want to know more about how the rating was decided...

"I'd like to know the definition of when it's given a certain score"

"Is this good or bad, how does it relate to my current machine?"

"What does the C rating actually mean in terms of water efficiency"

"Would like to see what an A and F grade detail would also be in comparison"

Secondarily, respondents were keen to understand more about the top rating (A), tallying with the above, but also the details about the washing machine's brand, model and capacity, suggesting an interest in functionality...

"More information about the weight. Not immediately obvious that this relates to washing machine capacity"

"I should want to know if the machine was reliable"

"Is this information only available for 6kg rated capacity?"

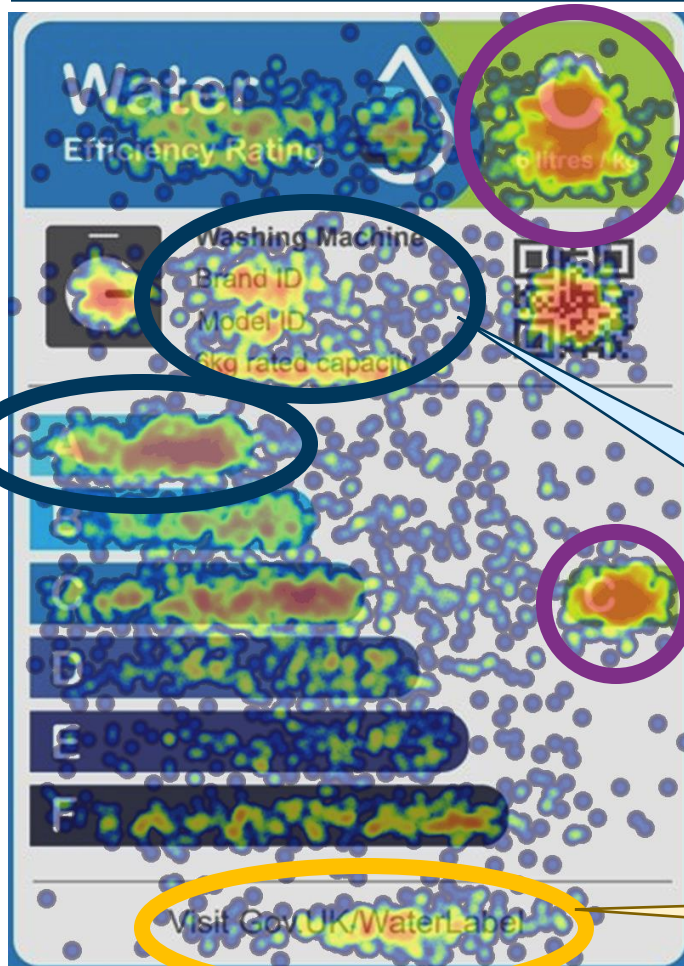
"What does rated capacity mean"

Finally, fewer respondents wanted to understand more about the link to gov.uk, suggesting its positioning on the label relegates it...

"What information the website provides"

"Understand what the whole thing means"

"The label does not tell me much so I would have to visit the website if I really wanted explanations"



# Further information needed



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# A keenness for further info, particularly about the scale, characterised the verbatim responses

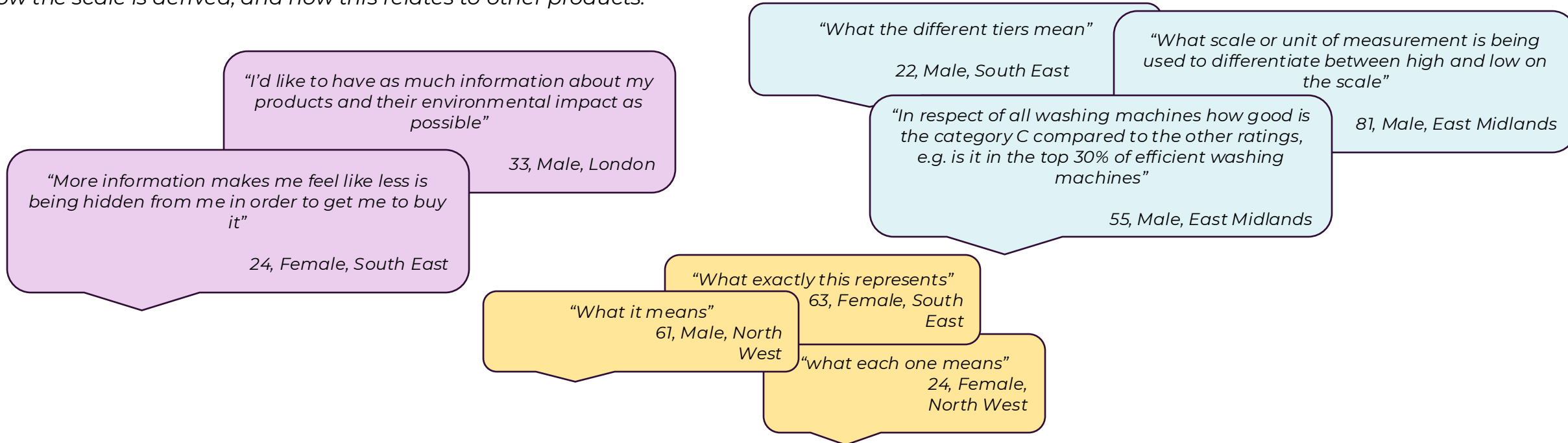


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Llais defnyddwyr dŵr

## What further information respondents want about the label

All that selected area in heatmap exercise

Respondents are generally keen to *have more information* to inform their purchase, with the label prompting a *desire to know more* among many. Some *focused on the specifics* – i.e. how the scale is derived, and how this relates to other products.



Base: Q\_LABEL\_HEATMAP. Please click on the areas that you would like to understand more about using your mouse, in order of preference. Click an area again to remove the selection. . Q\_FURTHER INFO. What further information would you want about those areas? All respondents (2440)

# Others wanted to know more about real world usage, the label's design, and the QR code

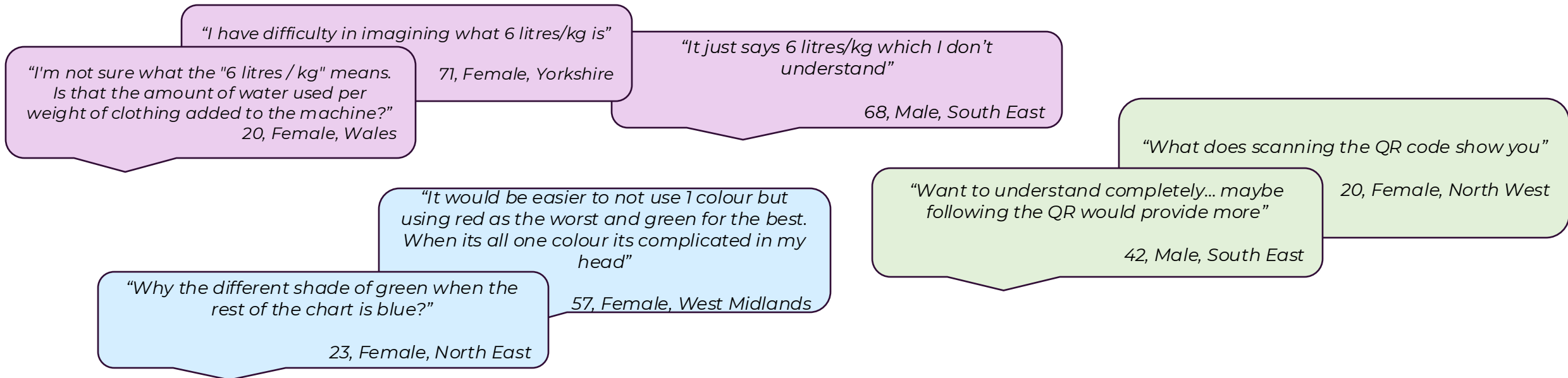


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## What further information respondents want about the label

All that selected area in heatmap exercise

For this label specifically, some wanted to know more about what **6 litres/kg** meant, and how it translates into real world usage. Others pulled out **specific design issues** with the label (e.g., the green rating label on the blue scale), and there was also interest in **what the QR code would provide**.



Base: Q\_LABEL\_HEATMAP. Please click on the areas that you would like to understand more about using your mouse, in order of preference. Click an area again to remove the selection. . Q\_FURTHER INFO. What further information would you want about those areas? All respondents (2440)

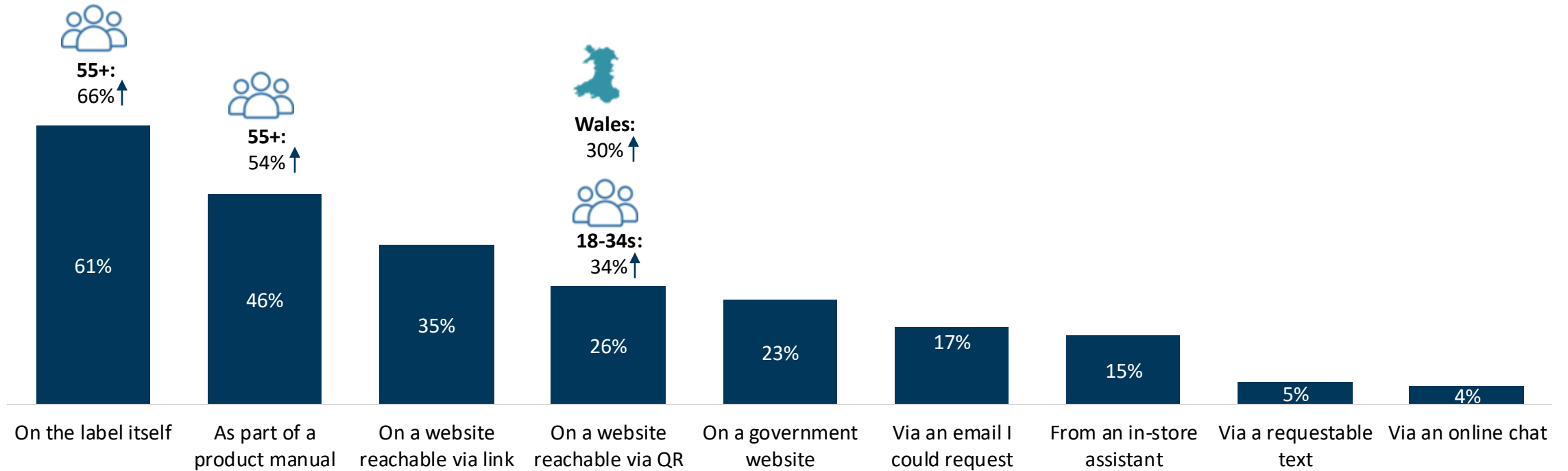
# Most would like to see more information on the label itself, but working with manufacturers and building a website is also necessary



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## How would you like to receive that information?

All who gave further detail they would like about the label



↑ Statistically higher than the total

Base: Q\_FURTHER\_INFO\_ROUTE. How would you like to receive that information? All who gave further detail they would like about the label (1934)

# Key recommendations



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# Key recommendations



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Ensure accompanying communications to the water label focus on how the rating is derived.



Translate the rating into real world context: what does a rating of A-F actually *look like* in terms of water use for a specific product? How does a rating of C compare to one of A, for example?



Encourage manufacturers to add more detail. Respondents are eager to learn more information as part of their product journey and see the benefit of manufacturers communicating about water efficiency, particularly as part of a product manual.



Close the intention-action gap by emphasizing the cost benefits of taking water-saving actions to consumers.

# Key communications recommendations



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Those that have water meters (including smart meters), are further inclined to make buying decisions that consider water efficiency. Installation of water meters is potentially an opportunity to raise awareness of the efficiency label and their water use.



Framing water-efficient products as a way to reduce bills could enhance engagement, especially where affordability is top of mind.



Ultimately, as buyers move along the purchase journey, the factors they consider narrow to more practical considerations of cost (both to buy, and to run products), and quality. Intercepting the product purchase journey earlier on when consumers are more receptive to information about water efficiency could encourage uptake of efficient products.

# Key communications recommendations



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These findings have challenged the hypothesis that consumers think water efficient products work less well, or cost more, than their non-efficient counterparts. Reinforce those positive findings by working to disseminate them further by encouraging manufacturers to focus on this. Spotlighting positive customer reviews (a key information source) that focus on the advantages of water efficiency may also help in this area.



Consumers not only think that efficient products work well, but understand that they benefit the environment, too. Emphasising this information in communications will be useful in promoting water efficient products to environmentally-conscious consumers.



Finally, consumers are time-poor, and, when buying out of necessity, as is most often the case, do not have long to consider the multitude of potential factors that go into a water-using product purchase. The water label as it stands is easily understood (potentially owing to familiarity stemming from the energy label) – use this ease of understanding to promote efficiency as part of that quick decision process that consumers are keen to take.

# Thank you!

For more information on this report, please contact:

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# Appendices



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# Appendix 1 – Full list of products tested



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# Full list of products tested

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1. Washing machine
2. Combined washer-dryer
3. Dishwasher
4. Shower wall outlet
5. Toilet
6. Shower head
7. Instant hot water tap
8. Washbasin tap
9. Kitchen (incl. utility room) sink tap

# Appendix 2 - Information gatekeepers



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# Women, high income earners and those who have a water meter are significantly more likely to prioritise water efficiency already



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## What product information is searched for

All respondents



Women: 20%  
55+: 22%  
Non-white: 23%  
Those with meter: 22%

## Perceived impact of water efficiency – Better for the environment

All respondents



ABC1: 79%  
White: 77%  
Landlords: 82%

## Perceived impact of water efficiency – Work better

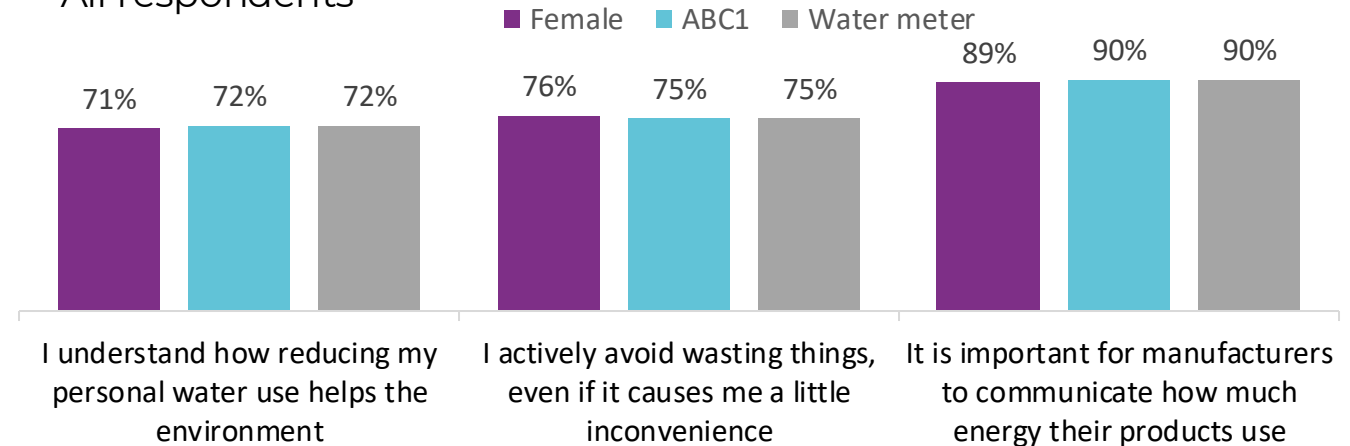
All respondents



ABC1: 38%  
Landlords: 44%  
Non-white: 44%  
Those with meter: 40%

## Attitudes (%NET Agree)

All respondents



# Appendix 3 - Home water fittings & fixtures (plumbing)



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# Looking at home water fittings & fixtures: larger plumbing products are thought to use a lot of water, but their potential for efficiency is also seen

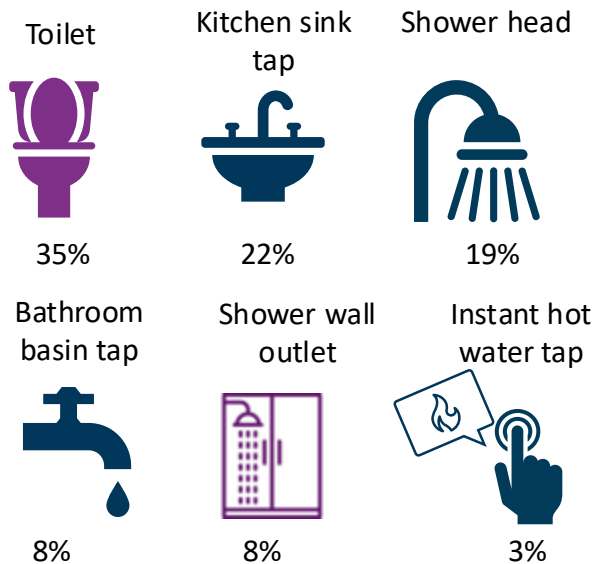


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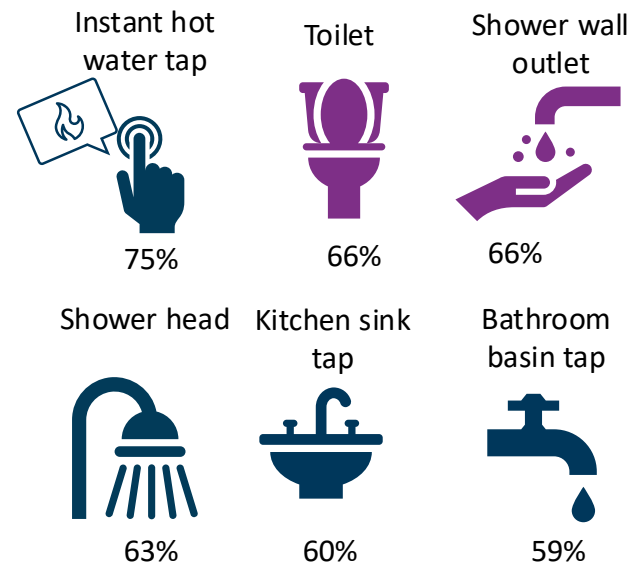
## Which product do you think uses most water?

All respondents



## Whether products are water efficient (%Yes)

All buyers



With the exception of instant hot water taps, perceived **water** efficiency for plumbing products lags behind washing machines (73%) and dishwashers (74%).

Consumers are aware that larger plumbing products, like toilets, use a lot of water. Bridging the gap between this understanding, and the importance of the product being efficient, is key in aligning efficient choices with those made for electrical appliances.

Large appliances / products are indicated using purple

Small appliances / products are indicated using blue

Base: Q\_UNDERSTANDING. Which product uses most water? All respondents (2440) Base: Q\_BOUGHT. Have you bought any of the following in last 12 months? All buyers (957)

\*NB. As 'combined washer-dryer' shown in same list as washing machine, do not interpret results on right hand side as a 'ranking', given most were likely to choose washing machine over combined washer-dryer' in single code choice.

# Appendix 4 - Additional data



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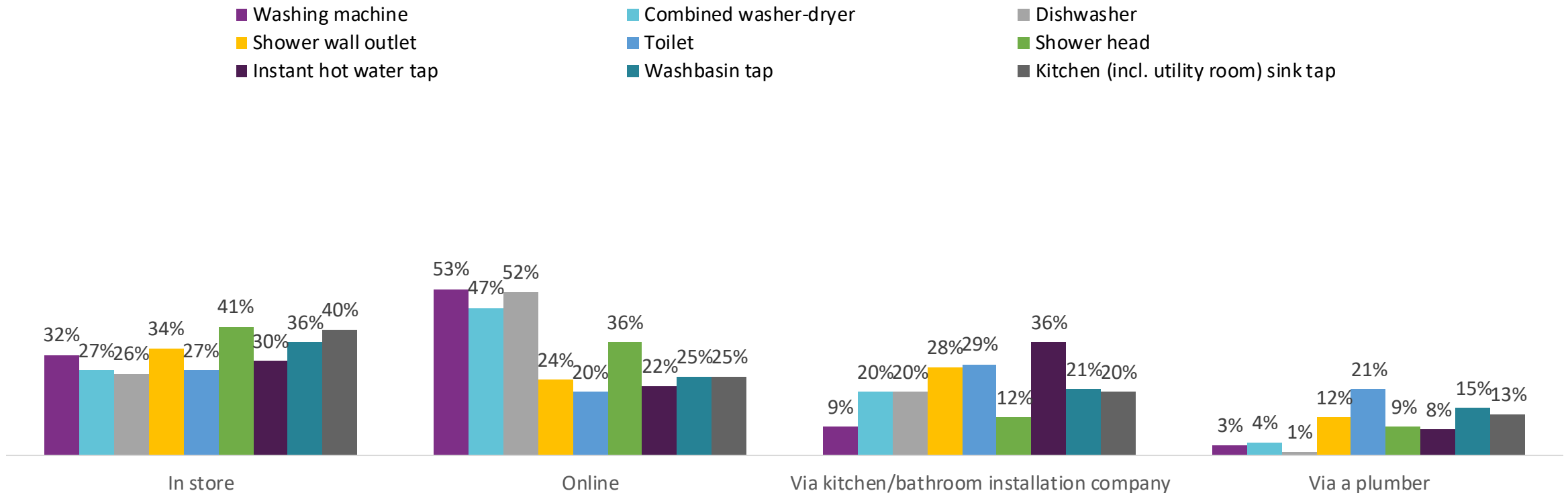
# In-store and online were the most common places to buy, with some variety by product type



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## Where products are bought

All buyers



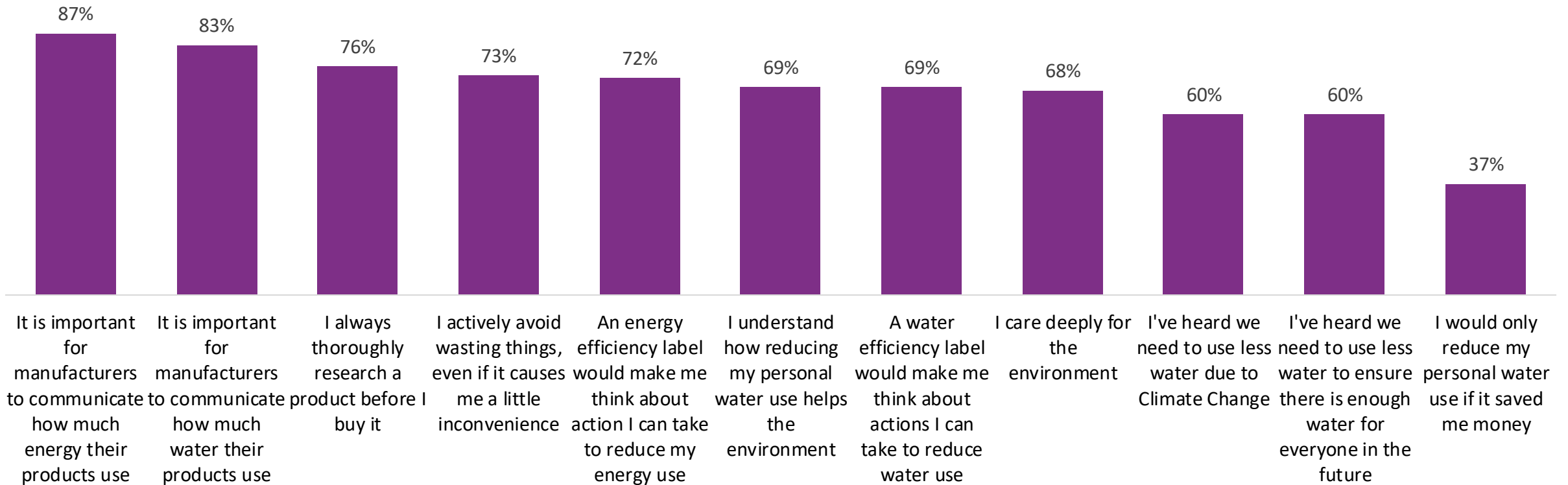
# The full suite of attitudinal questions



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## Attitudes (%NET Agree)

All respondents



Base: Q\_ATT. How far do you agree or disagree with the following statements? All respondents (2440)

# Four-fifths of respondents pay attention to energy efficiency when shopping for a new product

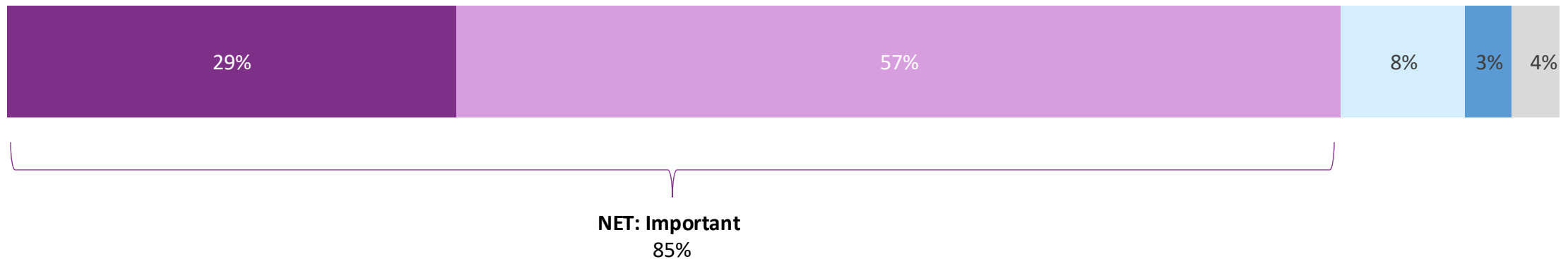


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## Energy engagement

All respondents

- Yes, it is very important in deciding which product I buy
- Yes, it is somewhat important
- No, it is not very important
- No, it is not at all important in deciding which product I buy
- Don't know

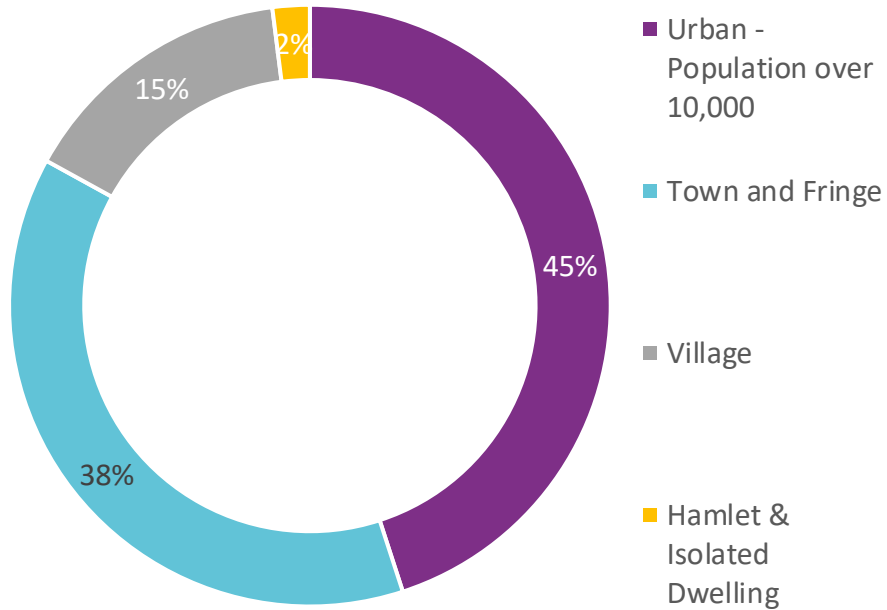


# Two-fifths of respondents live in urban areas. Thames Water is the top water provider



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**Urban/Rural split**  
All respondents



**Water company provider**  
All respondents

